

Japan Automotive LED Lighting - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Japan Automotive LED Lighting Market size is estimated at 0.79 billion USD in 2025, and is expected to reach 1.17 billion USD by 2030, growing at a CAGR of 8.13% during the forecast period (2025-2030).

Increasing demand for EVs and the increasing number of accidents are driving the growth of the market

- In terms of value share, in 2022, headlights accounted for the majority of the share, followed by others and directional signal lights. The market share is expected to remain the same for directional signal lights, reversing lights, taillights, and stoplights during the forecast period, with a small reduction in headlights. The combination of DRLs (daytime running lamps) with projector lights in frontal illumination is one of the increasing trends in the Japanese automobile lighting market.
- In terms of volume share, in 2022, directional signal lights accounted for the majority, followed by headlights and others. The market share is expected to remain the same with less fluctuation for these lights. Directional signal lights are the prime part that has a high probability of getting affected in minor to major accidents in all types of vehicles and require replacement.
- The government aims to reduce accidents by increasing its safety standards, resulting in increasing demand for automated headlamps and directional signal lights. For instance, the Japanese government has set a goal of reducing traffic-related deaths to less than 2,000 by 2025. In 2022, the Traffic fatalities nationwide declined to 2,610, which is down by 1% from 2021.
- In terms of expansion and innovations, Japan is one of the significant auto-producing nations in the world. The key automotive manufacturers in the market are focusing on expanding electric vehicles in the market. For instance, in 2021, new electric vehicles accounted for 36.2% of total new car sales, up from 35.2% in 2019 and 32.9% in 2017. Thus, the growth in NEV would increase the penetration of LED in the market.

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Japan Automotive LED Lighting Market Trends

Technology upgradation and increasing demand for EVs drive the LED lighting market's growth

- The total automobile vehicle production in India was 9.41 million units in 2022, and it is expected to reach 9.65 million units in 2023. The automotive supply industry in Japan was severely affected by the COVID-19 pandemic. Nissan intended to reduce global production by 20% in late May 2020. Sales in Japan fell drastically by 23% in June, with Toyota performing the best, followed by Honda and Nissan. As a result, the closure of Chinese factories led to a scarcity of the automobile components needed to produce LED lights. This led to a decline in Japan's overall manufacturing of car LED lighting.
- Japan has major automotive manufacturers such as Toyota, Mitsubishi, Nissan, Yamaha Motor Company, Isuzu Motors Ltd, Mazda, and Lexus. Japan's auto industry is moving toward developing connectivity, electrification, and automated driving. At CES 2017, Toyota unveiled its Concept-I car to demonstrate the company's vision for the future of mobility. The vehicle has an artificial intelligence (AI) helper named 'Yui' that communicates with the driver and other drivers on the road via LED lights and sounds.
- Sales of electric vehicles are rising rapidly in Japan, driven by cheaper "Kei" minicars (vehicles classified with engines of 660 cc or less in the case of gasoline models), which are driving the demand for the EV market. Due to their high energy efficiency, LED lights are becoming increasingly common in EVs as their demand rises. Due to the use of LED lights in strip lights for decorative purposes in dashboard strip lighting, the use of LED lights in interior lighting of vehicles in varied styling is also rising.

An increase in imported cars and government subsidies for the purchase of EVs drive the growth of the LED lighting market

- As of 2022, there were 28,546 charging stations in Japan. The number of imported electric vehicles sold in the country during FY 2022 rose 65% from the previous year to 16,464 units. There were 3.61 million passenger cars sold in Japan, and about 77,000 were EVs during FY 2022. The higher EV percentage for imported cars may reflect the wider variety of products offered by foreign makers than their Japanese rivals. Japanese car manufacturers have generally been slow to adopt electric and plug-in hybrid vehicles compared to some of their Chinese rivals. Affordable Kei minicars lead Japan's electric vehicle sales. However, EVs accounted for only 2.1% of new passenger car sales in Japan in FY 2022 compared to roughly 20% in China and Europe.
- The Japanese government offered subsidies to purchase CEVs. The maximum amount of the CEV subsidies given per vehicle in 2021 was JPY 800,000 (USD 7,200). In January 2023, the Japanese government announced the plan to ease safety rules for fast charging stations with more than 200 kW of power to reduce installation costs. In the process, HPCs will be placed on an equal footing with DC charging stations ranging from 50 to 200 kW.
- Subaru, a Japanese automaker, declared in May 2022 that it would build a new electric vehicle plant in the country, starting operations after 2027. It would be the first EV-only factory in Japan. In addition to the new facility, the current plant will be retooled to produce a specific number of electric vehicles, with an anticipated total investment of about JPY 250 billion (USD 1.68 billion). Thus, the above instances are expected to lead to the development and production of new power stations owing to the growing demand for EVs, which, in turn, is expected to boost the demand for automotive LEDs.

Japan Automotive LED Lighting Industry Overview

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The Japan Automotive LED Lighting Market is fairly consolidated, with the top five companies occupying 108.03%. The major players in this market are KOITO MANUFACTURING CO., LTD., Marelli Holdings Co., Ltd., OSRAM GmbH., Stanley Electric Co., Ltd. and Valeo (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Automotive Production

4.2 Population

4.3 Per Capita Income

4.4 Interest Rate For Auto Loans

4.5 Number Of Charging Stations

4.6 Number Of Automobile On-road

4.7 Total Import Of Leds

4.8 # Of Households

4.9 Road Networks

4.10 Led Penetration

4.11 Regulatory Framework

4.11.1 Japan

4.12 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2030 and analysis of growth prospects)

5.1 Automotive Utility Lighting

5.1.1 Daytime Running Lights (DRL)

5.1.2 Directional Signal Lights

5.1.3 Headlights

5.1.4 Reverse Light

5.1.5 Stop Light

5.1.6 Tail Light

5.1.7 Others

5.2 Automotive Vehicle Lighting

5.2.1 2 Wheelers

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5.2.2 Commercial Vehicles

5.2.3 Passenger Cars

6 COMPETITIVE LANDSCAPE

6.1 Key Strategic Moves

6.2 Market Share Analysis

6.3 Company Landscape

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and analysis of Recent Developments)

6.4.1 GRUPO ANTOLIN IRAUSA, S.A.

6.4.2 HELLA GmbH & Co. KGaA

6.4.3 KOITO MANUFACTURING CO., LTD.

6.4.4 Marelli Holdings Co., Ltd.

6.4.5 Nichia Corporation

6.4.6 OSRAM GmbH.

6.4.7 Signify (Philips)

6.4.8 Stanley Electric Co., Ltd.

6.4.9 Valeo

6.4.10 Varroc Group

7 KEY STRATEGIC QUESTIONS FOR LED CEOS

8 APPENDIX

8.1 Global Overview

8.1.1 Overview

8.1.2 Porter's Five Forces Framework

8.1.3 Global Value Chain Analysis

8.1.4 Market Dynamics (DROs)

8.2 Sources & References

8.3 List of Tables & Figures

8.4 Primary Insights

8.5 Data Pack

8.6 Glossary of Terms

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